Leveling the Playing Field:

A Proposal to Enhance the Electronic Delivery of Information to All Michigan Residents

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Executive Summary

AccessMichigan is a collaborative project of Michigan libraries of all types--from school media centers to public libraries to hospital libraries to academic research libraries--to create a digital information environment which will offer every resident of the state equitable and easy-to-use access to a core set of information sources. The AccessMichigan project has effectively bridged the gaps among different types of libraries for the first time and draws together several similar information access projects in the state of Michigan. The project will provide a rich assortment of online databases, a common user interface, and training for Michigan librarians and the general public in effective use of the electronic resources.

Library and information technology are changing very rapidly, and the amount of information flowing through society has made it impossible for any library to obtain all the materials, electronic and print necessary to meet the information needs of its service population. Not only has the amount of information increased dramatically, but the cost for access is changing. Because of demands from their patrons, libraries are now forced to spend a higher percentage of their budgets on electronic resources. This has caused strains for many libraries and has contributed to a widening gap between information-rich and information-poor communities. To meet the challenge of ever-expanding needs for information and to control the escalating costs for access to information, libraries are forming consortia which will aggregate demand and lower the cost per library for use of the latest information technology. AccessMichigan is the response of Michigan librarians to these trends.

In July 1997, the Library of Michigan provided a start-up grant from existing federal funds for the first AccessMichigan project. This grant provided Michigan residents with access to several online databases for one year. To expand and enhance this initial effort, we are requesting $7,000,000 over five years from the Kellogg Foundation to fund a portion of the estimated $28 million cost of the AccessMichigan project. The remaining costs for the project will be shared by federal Library Services and Technology Act (LSTA) funding distributed by the Library of Michigan, the Michigan legislature, local communities, and Michigan libraries. By the end of the five year grant period, we expect that the Michigan legislature, Michigan libraries, and local communities will provide the funding necessary to carry the project forward.

The funding from the Kellogg Foundation will focus on providing information content to Michigan residents and will meet the following program expenses:

- Database licenses
- Computer hardware and software
- Research and development for a common user interface
- Enhancement of state-wide resource sharing mechanisms
- Document delivery services

This grant will enhance the ability of Michigan libraries to provide access to electronic information resources and improve delivery of information to the state's

residents. We welcome the opportunity to meet with you at your earliest convenience to discuss this proposal.

The Needs

The World Wide Web and the Internet are changing the ways in which Michigan residents find the information they need to make decisions. By fostering cooperation among libraries of all types and sizes, the AccessMichigan project will allow libraries to harness these technological innovations and to offer every resident a consistent set of core resources.

- **Need for equal access to information.** Differing local resources mean that access to information is uneven across the state. This creates significant problems:
    - ♦ Elementary, high school, and post-secondary students in information-poor communities struggle to compete effectively with students in information-rich environments.
    - ♦ Local governments and businesses may lack the information they need to make management and development decisions.
    - ♦ Communities with poor information resources may have trouble attracting new businesses and services.
    - ♦ Residents of information-poor communities may not have access to the training they need to succeed in today's changing job market.

- **Need for easy access to a selection of high-quality, reliable information resources.** Because of the anarchic nature of the Internet and World Wide Web, libraries need to help their patrons find high-quality, reliable resources. Librarians can make these resources easy to locate and use by creating a common user interface, which can be available all over the state.

- **Need for electronic full-text information sources, efficient interlibrary loans, and rapid document delivery.** Because users frequently need information quickly, they require ready access to information in electronic formats. For materials that are not available electronically, they need easy interlibrary loan procedures and methods for timely delivery of non-electronic materials.

- **Need for cost sharing.** The number and scope of electronic resources is growing rapidly. Sharing the evaluation of resources and purchasing them on a state-wide basis is the most cost-effective way to provide resources equitably.

Objectives

- **Online databases**

Online databases will be the core of the AccessMichigan project. In July 1997, the Library of Michigan used funds provided by the federal Library Services and Technology Act (LSTA) to provide the initial databases of the AccessMichigan project. The Library of Michigan contracted with OCLC, Online Computer Library Center, Inc. for FirstSearch and Information Access Company (IAC) for SearchBank to provide libraries with online access to current events, medical, marketing, investment, consumer, and other

types of information. The package includes thousands of magazines articles with full-text which can be immediately printed or e-mailed.

In the future, the AccessMichigan project will provide central funding for additional information sources which have broad, universal appeal and which assure that every library patron has access to a core set of information resources to their patrons, regardless of geographic location. Some libraries will use local funding to enhance these core resources. The AccessMichigan project will allow these libraries to aggregate demand so that licensing fees and subscription rates can be negotiated at favorable prices.

- **Training**

  Michigan already has many groups which conduct training sessions for librarians. Some of the major providers of training include the public library cooperatives, the Library of Michigan, the Michigan Library Association, Regional Educational Media Centers and the Michigan Library Consortium. To date, there has been little coordination among the various groups. The AccessMichigan project will enable a much higher degree of coordination by creating a common training calendar and a network of trainers. This will help librarians feel comfortable with the new services and will lead to better service for library users.

- **Access to the Internet**

  Local issues such as the size of the library, availability of local funding, and availability of Universal Service Fund discounts will play a major role in decisions about the type of Internet access in local libraries. A direct connection to the Internet will be required for libraries to take full advantage of the databases and services offered through the AccessMichigan project. To underscore the importance of such a connection, the AccessMichigan steering committee will appoint a liaison committee to work with other organizations such as Merit Network, Inc. and the Office of the Michigan Information Network (MIN). Merit and MIN will have involvement with creating the direct connections, whether the connections are ISDN, T1, or other. The liaison committee will keep all parties informed of decisions and changes in the environment which will impact the ongoing implementation of AccessMichigan services. Because the Universal Service Fund is expected to have a significant impact on the ability of libraries to afford advanced telecommunications services, we are not asking the Kellogg Foundation to fund activities in this area.

- **Digitization projects**

  In July 1997 an Ameritech grant of $166,667 was awarded to Merit Network, Inc. to develop a Community Information Network Tool Kit. The tool kit will help libraries work with other local agencies and organizations to identify resources which would be good candidates for digitization. The tool kit will contain hardware and software recommendations for local libraries to use on the digitization projects. By using the tool kit and creating networks with other local organizations, libraries will make available a wide range of local information on the Internet which is now difficult, if not impossible, to locate. The AccessMichigan project will work to insure ready access to these materials, enhancing the value of many local materials. If local storage of the digitized project is not

available, the AccessMichigan project will provide a server and software which will make these collections available through the World Wide Web.

- **Enhance the Michigan Electronic Library**

The Michigan Electronic Library (MEL) has been a successful joint project of the Library of Michigan, the University of Michigan Libraries, and Merit Network, Inc. Michigan librarians find MEL a valuable tool for locating information resources on the Internet.

In order to move the Michigan Electronic library into the future, we propose the following enhancements:
- ♦ Add an Internet "spider" function. This will allow us to create subject-based collections from sites linked to MEL. The spider crawls out to those Internet sites in a particular subject area and creates a searchable index of those sites.
- ♦ Move MEL from HTML pages to a database of records. This will require new software and in-house programming to convert MEL's 19,000 links into 19,000 records.
- ♦ Install a commercial link checker and site management tool. This would help selectors keep MEL up-to-date with less time spent manually checking links and references.

- **Enhance SPAN, the state-wide serials union list**

The Serials, Periodicals, and Newspapers (SPAN) database is an Internet accessible, state-wide list of magazines and journals held in more than 875 Michigan libraries. Initial discussions for SPAN were undertaken by the directors of the Regions of Cooperation (ROCs), and a pilot project was undertaken in February 1997. In August, the project was released to Michigan libraries. The AccessMichigan Steering Committee has named a liaison to the SPAN Advisory committee and will have ultimate responsibility for SPAN.

To achieve maximum effectiveness, SPAN must be expanded to include more Michigan libraries. The AccessMichigan project will develop incentives for current non-participating libraries to include their holdings in SPAN and for current participants to update existing information. Other enhancements may include links to document delivery suppliers, links to online databases, and enhanced interlibrary loan tools.

- **Enhance state-wide resource sharing tools**

New technology will allow Michigan residents to locate the books and other materials in any Michigan library and to make interlibrary loan requests for the needed materials. As software tools and standards become more sophisticated and robust, we have more options for creating this functionality. The AccessMichigan project will explore these options and identify mechanisms which will enhance current resource sharing services.

- **Common user interface**

The World Wide Web has accelerated the introduction of new online services. Most of these have a proprietary user interface, and each one is different. The ANSI Z39.50 standard allows for interoperability among databases with varying user interfaces by creating a standard set of protocols for information requests and retrievals. The Z39.50

standard will form the basis for developing a common user interface. Local libraries will have the option of using this interface or using the native interface provided by the database provider.

- **AccessMichigan gateway**

  There will be an Internet-accessible gateway to the AccessMichigan project available to all Michigan libraries and residents. This gateway will include links to online databases, library catalogs, MEL, SPAN, state government information, local community projects, a training calendar, and professional development activities and information sharing for librarians.

- **Document delivery**

  The OCLC FirstSearch and IAC SearchBank subscriptions contain access to a number of full-text files. With its goal of facilitating enhanced access to information, the AccessMichigan project will focus on delivering as much full-text electronically as possible. However, the percentage of documents available in a digital format is a very small fraction of the entire universe of bibliographic materials. For the foreseeable future, it will be necessary for libraries to share books and other materials through a ground-based delivery service. The AccessMichigan Steering Committee will examine the need for a state-wide courier service to deliver books and other materials around the state.

Appendix 1: Management & Evaluation

The Library of Michigan Foundation will be the fiscal agent for the grant. The AccessMichigan project does not seek to create a new bureaucracy but will utilize existing organizational structures to provide services as efficiently as possible. As fiscal agent, the Library of Michigan Foundation will contract with another organization to offer management services for the AccessMichigan project. An extant organization will be able to adapt quickly to provide the additional services which will ensure success.

The AccessMichigan project will require 4.0 paid full-time equivalent (FTE) staff to administer the projects. Staff working on the AccessMichigan project will be employees of the contractor and will be supervised by the AccessMichigan Coordinator.

- **AccessMichigan Coordinator**, FTE 1.0: The AccessMichigan Coordinator will be a librarian with experience in library networking, preferably in a multitype library setting. The coordinator will be charged with overseeing implementation of all AccessMichigan projects and for assessing the suitability of future activities. Promotional activities will be a key focus for the coordinator.

- **Trainer/Asst. Coordinator**, FTE 1.0: Training librarians to use the services funded through AccessMichigan will be key to successful project implementation. This will require an experienced trainer who can develop training programs and present sessions around the state. The trainer will work closely with the AccessMichigan Coordinator as projects are developed and negotiations with vendors are undertaken.

- **Systems administrator**, FTE 1.0: AccessMichigan will need someone with systems analysis experience and the ability to administer a network server. Consulting with Michigan libraries will be an important part of this job as well. More and more libraries will be migrating from dial-up to direct access to the Internet, and it is important that libraries have an individual who can act as a liaison with other organizations such as Merit Network, Inc. and the Office of the Michigan Information Network to accomplish this.

- **Administrative Assistant/Accounting Assistant**, FTE 1.0: There will be considerable administrative work, including compiling mailings, maintaining mailing lists, scheduling, etc. Bookkeeping skills and knowledge will be important as work progresses with an increasing number of database and information providers.

Oversight for the AccessMichigan project will be accomplished through the AccessMichigan Steering Committee, a representative committee of librarians from all types and sizes of libraries. The AccessMichigan steering committee will be charged with overseeing and guiding the development of the project.

Program Evaluation

We will take a multifaceted approach to program evaluation. An evaluator will be hired on a contract basis to plan, implement, and conduct the evaluation of this program. The evaluator will work with the State Librarian, librarians around the state, and others associated with managing the project and will be responsible for submitting an annual

report to the W. K. Kellogg Foundation. It is vital to involve the evaluator at the beginning of the project to insure that pre-project indicators will not be lost. As the project matures and grows, the evaluator will recommend changes which will insure the project's success and keep the project consistent with the goals understood by the Kellogg Foundation to be central to the project.

The AccessMichigan steering committee will be responsible for evaluating specific aspects of the project, including the selection of online databases, development of the AccessMichigan gateway, and resource sharing mechanisms.

Appendix 2: Financial Analysis

AccessMichigan projects thus far have been the result of funding provided by the federal Library Services and Technology Act (LSTA) and distributed by the Library of Michigan. The state legislature has provided $500,000 for AccessMichigan projects in FY98.

Total project cost will be approximately $28 million over five years. We are seeking $7.0 million from W. K. Kellogg Foundation over that period of time. Additional expenses will be covered through grants from LSTA funds received by the Library of Michigan, from local and in-kind contributions, and from anticipated revenue from the Michigan legislature.

- **Library Services and Technology Act.** The Library of Michigan is committed to the use of LSTA funds for the AccessMichigan project for the next few years. This is not hard money, however, and is subject to the vagaries of the political process. In addition, federal money has historically served as start-up funding and not as ongoing operational funding. At the end of five years, we expect the Michigan legislature to contribute $7.0 million annually for ongoing AccessMichigan projects.
- **Local contributions.** Local communities and institutions will be asked to bear a portion of the costs of the AccessMichigan project.

  - Access to the Internet. Local municipalities, campuses, and school districts are likely to bear the brunt of the costs associated with providing libraries access to the Internet.
  - Additional databases. Some libraries may wish to add to the core of databases provided through the central funding. These additional databases will be the responsibility of the local community.
  - Digitization projects. It will be up to each locality to determine which collections are the best candidates for digitization and to fund the actual digitization process.

  - In-kind contributions. Some local communities and institutions will choose to contribute by offering in-kind contributions. Michigan State University, for example, is offering free interlibrary loan of magazine and journal articles to any Michigan library. This is worth $30,000 annually.

- **Ameritech Grant.** In the spring of 1997, Ameritech awarded a $167,000 grant to the Library of Michigan for development of a Community Information Network Toolkit.

The Library of Michigan contracted with Merit Network, Inc. to develop the toolkit, and it will be ready for use by mid-1998.

- **Michigan Legislature.** We are optimistic that the legislature will be receptive to this project, for the following reasons:

    ♦ This is a collaborative project, involving all type of libraries and all levels of the education community. The private sector, through their corporate and special libraries, is also included in the AccessMichigan project. With such broad-based support throughout Michigan, legislators will find little to criticize. Through the work of project partners, we will be able to mobilize constituents to support the project.

    ♦ With very little effort and at a very late juncture in the process, the legislature committed $500,000 to AccessMichigan projects for FY98. With a pilot project already in-place and generating increasing usage, it will be easy to demonstrate the need for increasing public support.

    ♦ Support from the W. K. Kellogg Foundation will make the AccessMichigan project more attractive to legislators. Such support will show that this is a project with significant backing from a broad array of public and private interests.

The following page contains a detailed five-year budget. At this time, projections of costs are "best estimates" since exact services are yet to be determined. The budget shows contributions from the Kellogg Foundation and from other sources such as LSTA, the Michigan legislature, and Michigan libraries and library agencies. We believe that this is a realistic outline of expected costs, and it is one of several possible means of delivering the services outlined in this proposal.